Unit 4

Using CRM Application: FreeCRM

Introduction

CRM software provides support to maintain and compile customer records across different points of contact between the customer and the organisation. This could be telephonic, by e-mail, an online chat, marketing products or the company's website. CRM software also provides a customer's personal information, purchase history, deals, targets, documents, assigning details, priority, buying recommendations and concerns to customer service representatives.

An employee's contact information, performance reviews and benefits within a company can be tracked with the help of CRM.

Due to the growth of the Internet and related technology, customers are worried about the privacy and safety of their personal information. Basically, data are needed to assure that customer related information has the highest levels of security against cyber criminals.

FreeCRM web application provides default company information for creating new contacts tasks, deals and

Notes

other objects. For example, the Shortlist feature allows for a quick list; Message boards are provided where your team can communicate and leave important messages for each other; Custom views allow you to create different presentations of your data using extended search parameters; Schedule a call by creating an event entry for it in My Calendar; Schedule a meeting event by choosing a name for the engagement and selecting your team members who will attend; the Call List is a link to schedule calls for you and your team members; Resources are information links, which can be informational postings with instructions or any other free text, or can be hyperlinks; the Team View is a top–down view of your team and its progress; importing contacts from Outlook, your Palm, Act, Goldmine, Salesforce or other applications is a quick way to get started and migrate from your current CRM; exporting data gives you a copy of all of the information contained within the CRM application. You may export all the information tables including Companies, Contacts, a combined table of both, Deals, support Cases, Tasks and Calendar items. Sales targets are extremely important for tracking key measures by amount of units sold, revenue-based goals and customer service metrics. Update Profile allows you to set a default currency, a time zone and welcome text for your team. Administrators may then select if users can share information, if information is private, or if only managers can see private information. The Calendar is a monthly view of all of your important events, calls, tasks, or whatever you want to store and track.

Basic Steps to Login in FreeCRM

1. Log in and click Setup on the top-right of the screen (the silver tab).
2. Choose Update Organisation (3rd choice) and fill in all the information about your particular organisation and then click Save.
3. Go back to Setup and click Update Profile (1st option). This is where some very important

parameters are set, including default currency, time zone, security access mode, look-and-feel and clock mode. Click Save when finished and go back to Setup.

4. Use the Regions and Set Unavailable Times and Availability by Region if your organisation is multi-location. Save all your changes and return to the Setup menu.
5. Select Create/Edit Users. Add as many users as you like; be sure to choose unique user names; we suggest using email addresses as the user names. Also, you can designate managers/administrators for special users as you create them. The system defaults to creating standard users.
6. From the Setup menu, choose Setup Extended Fields. This allows you to customise company, contact and event/appointment records with specific information that pertains to your business.
7. Choose the last option, Setup Field Sets to customise products and deal records to match your specific business.
8. Click POP Accounts on the left-hand navigation. Then click New POP Account and add as many POP accounts as you like by giving a title to the account (Account name), the e-mail address, the host name or IP address of the server and the username and password for the POP account. Click Save to record the POP account information.
9. Click Import/Export from the left-hand navigation to import comma separated values (CSV) files from Act!, Goldmine, Microsoft Outlook, Palm, Salesforce, NetSuite, Upshot, Salesnet or any other application.
10. You may now start using the system. We suggest that you begin first by going to the Sales Targets section using the left-hand navigation and creating sales targets for user.

Notes

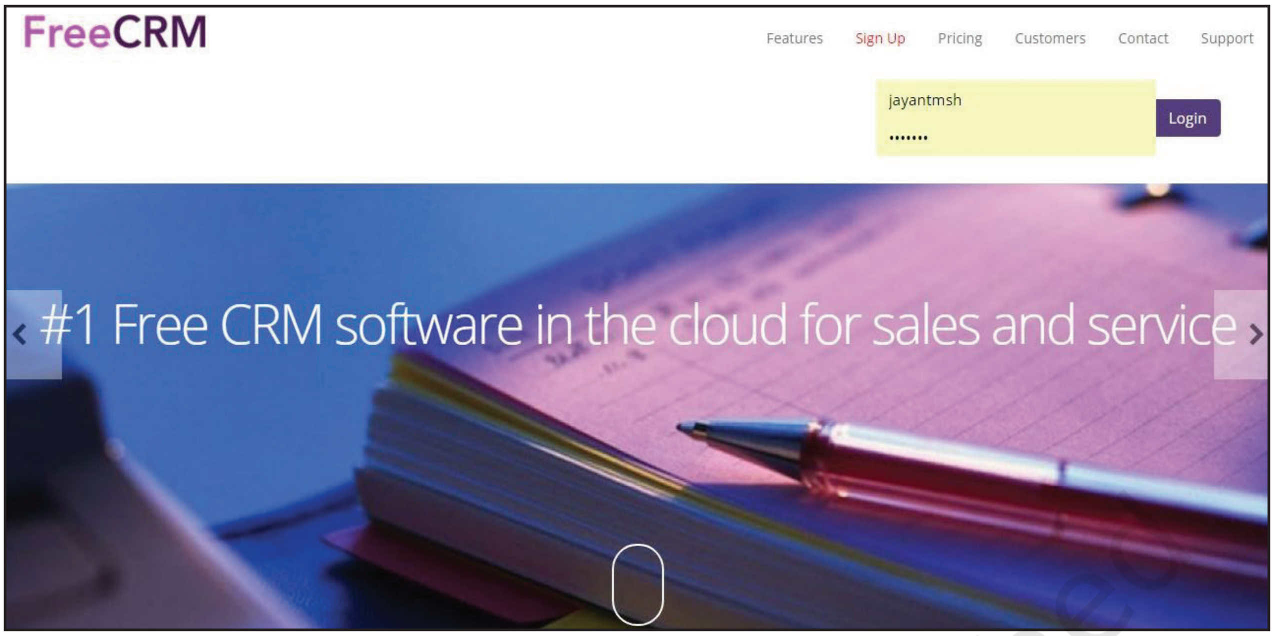


Fig. 4.1: FreeCRM Login Home Page

Home

This is user sales automation home page, where user can manage customer relationships and interact with user sales force.

First, go to Setup and add new users to old user account under Create/Edit users. Add as many as user want in our free version. Professional users will be billed $9.95/month per user.

Here user can see calendar and a quick list of upcoming events for the week. The user can also see a call list and any e-mail campaigns user that are active.

There are quick links on the left side of the screen to the message board, which is a standard announcement and discussion page for user team members. Also, user may schedule calls, create a meeting, or create a quick company or contact.

User may also quickly import data from Palm, Microsoft Outlook, or a number of other applications easily, including Act! and Goldmine. Simply choose the import feature and follow the easy steps provided. Please note that this may be a fee based feature that could require user to upgrade to the professional version of the software or pay a fee. FreeCRM is a free and open source web application to be used for various CRM

activities. But you are required to pay for some options, such as e-mail. It will allow using email facility after paying the fee. For these can go to the message **Upgrade your account** on top of the page. By clicking on this you can pay user fee.

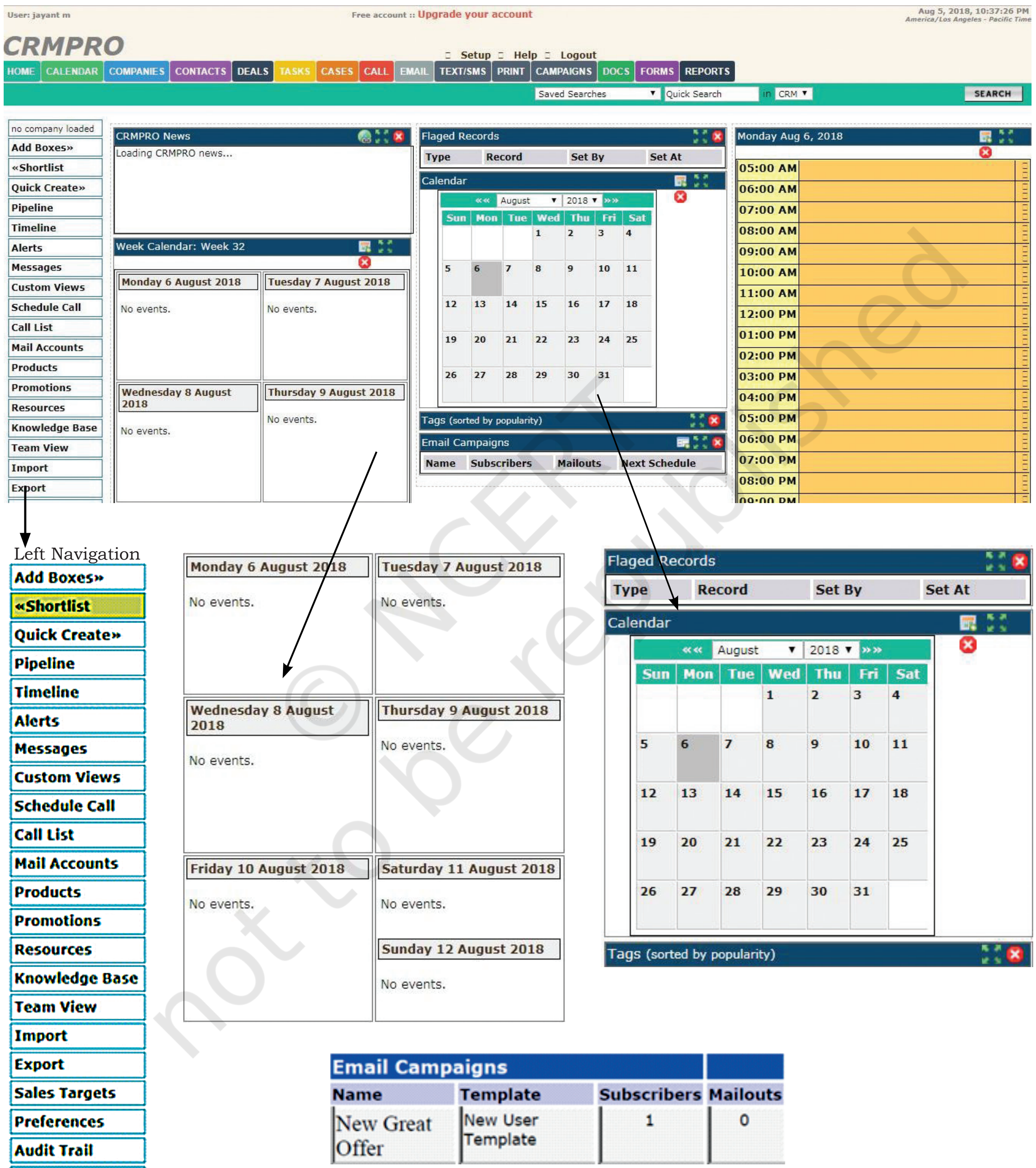


Fig. 4.2: Logged FreeCRM

The first step is to set up any POP email accounts user may have. This way, user can utilise all the e-mail functions.

On the left navigation bar are links to team resources, which are links to important web sites for you organisation.

Also, there is a link to view user Team and Sales Targets. Some of these features may only be visible to the administrator account of user organisation.

Default Company

Fig. 4.3: Quick Create windows

The Default Company feature locks default company information for creating new contacts, tasks, deals and other objects. To activate this feature, navigate to the Company tab and select a company by clicking on the link for the company name. User should then see the details for the company and under Default Company user should now be able to see this name. From this point on, creating a new contact, deal, task, case or other data items will default to this company.

When user create a company user will see a window as shown in Figure 4.3.

After clicking the Quick Create option user will create a company.

Shortlist

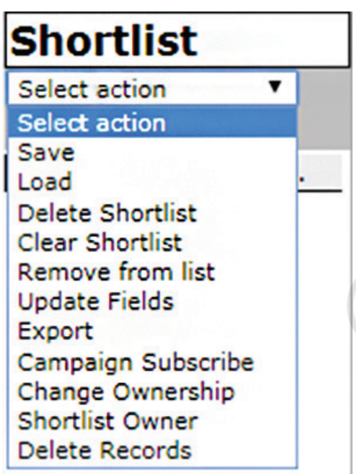


Fig. 4.4: Shortlist Options

The Shortlist feature allows for a quick list which is accessible at all times from a new left-hand window. To activate the shortlist, select the FLAG link from any list of companies, contacts, or any other item in the system. This creates a fast pick list of items from which user can now quickly navigate. User can deactivate the shortlist by toggling on and off using the left navigation button for Shortlist.

Message Board

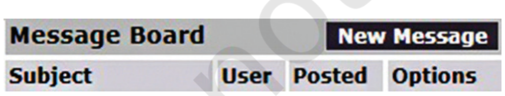


Fig. 4.5: Message Board

Message Boards are provided where user team can communicate and leave important messages for each other. Utilise the Message Boards to discuss issues or post notes concerning the general operation of business. Click New Message to start a discussion thread. Other users may now choose to reply to the message that has been posted.

Custom Views

Custom views allow user to create different presentations of user data using extended search parameters. Simply create a custom view for user contacts and companies; select the fields that user want to see and give the custom view a title. After creating a custom view user can then utilise the extended search features on the Company and Contact sections. Simply click Extended Search and then select a view to apply from the drop-down selection box.

User may additionally select to filter on status or matching parameters in the name field.

Fig. 4.6: Custom Views

Schedule Call

Schedule a call by first checking the box 'Schedule this call for the date below and create an event entry for it in My Calendar'. Select date and time and also choose a Call Script for the call. User may assign the call for a team member by selecting the drop-down box. The call can be an arbitrary contact and phone number, or alternatively user may select from the existing contacts and client lists using the lookup buttons on the respective fields. Notes for the call can also be recorded to assist in the future scheduled calls.

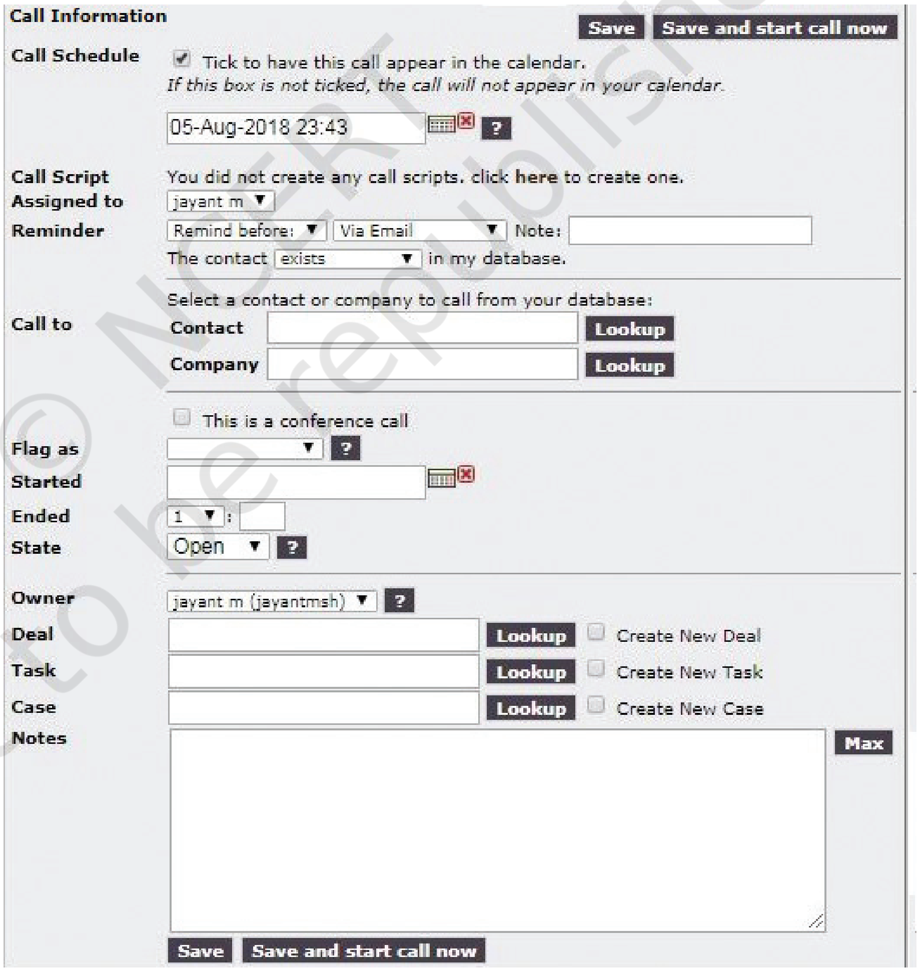


Fig. 4.7: Call Information

Create Meeting

Schedule a meeting event by choosing a name for the engagement and selecting user team members who will attend.

Highlight the team members' names in the left pane and click the Add button to add each team member to the right pane. As the user select each team member, the right information pane will show if the resource is available for the event.

Call List

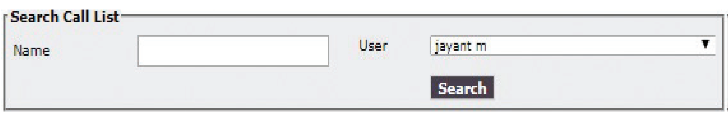


Fig. 4.8: Search Call List Window Call List

The call list is a link to scheduled calls for user and their team members. The call list is divided into two parts—a list of calls to be made and scheduled calls.

POP Accounts

The integrated POP email feature automates and integrates user most powerful online tool—user very own email.

First, user must have a POP3 account; enter user POP mail server and authentication information, give a title to the account and a description and save user new POP account. User can aggregate an unlimited number of POP accounts.

Select 'New POP Account' button to create the new POP account; enter the account name, e-mail address, host server name or IP address, username and password. User may also give a description of this POP mail account.

Select 'Get' to view user POP mail. This account is integrated for outgoing correspondence and is not intended to replace user normal mail reader. User can view the last messages.

Resources

Resources are information links, which can be informational postings with instructions or any other free text, or can be hyperlinks. Create resources for marking quick links to partner sites, vendors,

customer websites, legal documents or any other kind of web resource.

Enter the type of link, either hyperlink or data types, a title or the URL. For a data resource, a large text box will be presented, allowing user to input user resource message for user team's instant access.

Team View

The team view is a top–down view of user team and its progress. Managers and administrators as well as other team members have instant access to the rest of the team, with contact information and other integrated features, event scheduling, document sharing and messaging.

From this view, user can quickly update and edit team member information. Simply click on the name of the team member to view their information and to create actions, or click on the Edit button to update any of the team member's information.

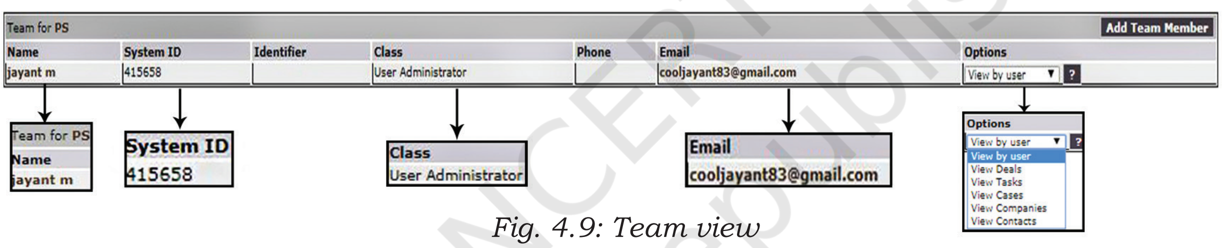


Fig. 4.9: Team view

Import

Importing contacts from Outlook, Palm, Act, Goldmine, Salesforce or other applications is a quick way to get started and migrate from user current CRM.

The user can import and comma separate tab-delimited or custom delimited files. User may include the first row as headers to make the import easier, or import the file and begin mapping the columns.

First, user must Export data from its current location. Below is a quick guide to exporting data from a number of popular programs.

Exporting data from Microsoft Outlook

1. Choose File Import and Export.
2. Select Export to a file and then click Next.
3. Choose comma separated values and then click Next.

Notes

4. Select the Contacts folder and click Next.
5. Save the exported file to a known location. Name the file with an extension of CSV, for example, name the file 'export.CSV'.
6. Confirm the export in the next window; user may customise the field mappings.
7. Click Finish.

Exporting data from Palm Pilot

1. HotSync user Palm to synchronise all user latest changes.
2. Start the Palm Desktop.
3. Click the Address button on the left-hand navigation.
4. Click File_Export.
5. Choose a file name and select Export type as Comma Separated.
6. Choose a file name with an extension of CSV, such as export.CSV.
7. Choose a range of All or currently selected contacts.
8. Click the Export button.
9. Specify Export Fields for the resulting file to make sure all information is exported.
10. Click OK.

Exporting data from Act!

1. Choose File||Data Exchange and then Export.
2. For File type, choose Text – Delimited.
3. Choose a file name and location, such as export CSV.
4. Choose Next, then select Contact records only.
5. Choose Options, make sure Comma is selected for field separator.
6. Check Yes, export field names and then click OK.
7. Click Next, then All Records, then click Next.
8. Click Finish.

Exporting data from Goldmine

1. Choose Tools >> Import / Export Wizard >> Export Contact Records.
2. Choose Export to a file and ASCII file and then click Next.
3. Select All Contact Records and then click Next.
4. Add all the fields that user wants to transfer and click Next.

** DO NOT EXPORT THE NOTES FIELD

5. Enter a file location and CSV extension, such as export.CSV.
6. Click Export GoldMine field names that has mappings as first record and click Next.
7. User may save these file export settings as a profile (optional).
8. Click Next, then Finish.

Exporting data from salesforce.com

1. Obtain export files leads.csv and/or contacts.csv from salesforce.com.
2. Import each file directly using the Import tool; user may have to remove duplicate records from the two files. Export data form: Select export options below. It is recommended to use a Tab Delimited export for opening in MS Excel.

The export will open in a new window.

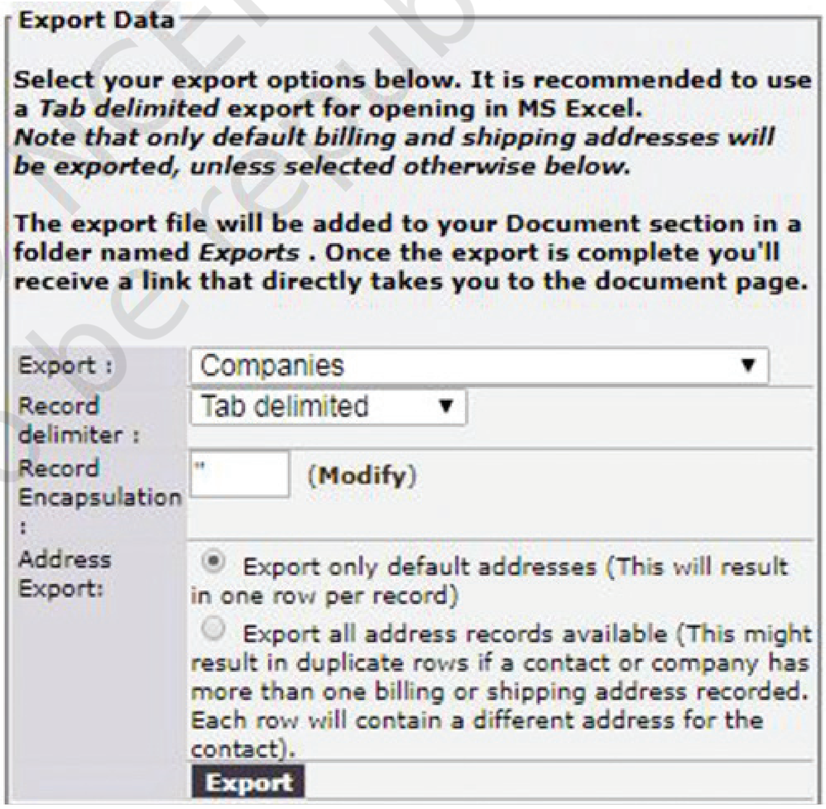


Fig. 4.10: Export Data Window

Export

Exporting data gives user a copy of all the information contained within the CRM application. User may export all the information tables including Companies, Contacts, a combined table of both, Deals, Support Cases, Tasks and Calendar items.

First, choose which table user want to export and select if user want the result to be displayed in the browser or automatically open the Microsoft Excel application. Next, choose a field delimiter, such as tab-delimited or comma separated. User may then select a record encapsulator, such as quotation marks (default) or any other character that the user chooses; user may then select whether they want a line feed or a carriage return as a row separator.

Click the Export button and the user will then have user data displayed, which user may save and manipulate as per wish.

Sales Targets

Sales targets are extremely important for tracking key measures by the amount of units sold, revenue based goals and customer service metrics. Create a target and assign the type, whether it is by number of goods sold, number of customer support cases, or revenue-based goals. User can assign a timeframe in terms of months, quarters, or years and assign multiple team members to the sales target that is created.

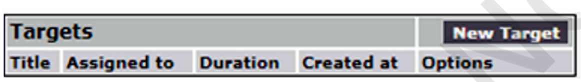


Fig. 4.11: Targets Window

Profile Setup

Update Profile allows user to set a default currency, a time zone and welcome text for user team. Administrators may then select if users can share information, if information is private, or if only managers can see private information.

User can also select the default design look and feel using the skins selection box, a clock mode and the amount of history shown for user activity tracking. User may then designate start and end times for user work days and also if user want to check schedules against a user's availability.

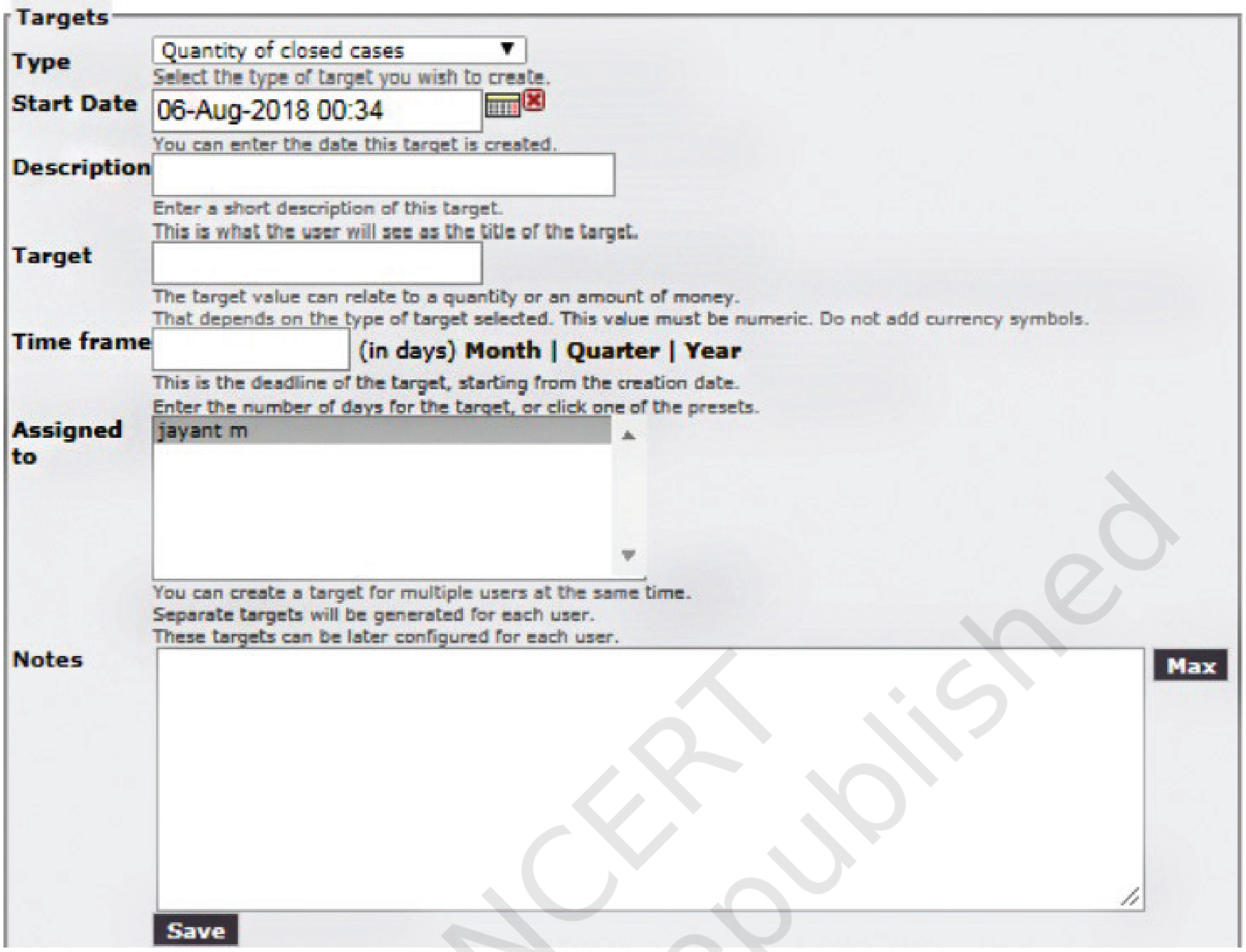


Fig. 4.12: Setting New Target

Calendar

The Calendar is a monthly view of all user important events, calls, tasks, or whatever user want to store and track.

Simply point and click through the Calendar to the date and time that user want, then schedule an event.

When viewing the monthly calendar, click on the date that user want to see or schedule and drill down to the exact details of each event. User should now see a running view of a single day with the hours on the left side and a memo/entry field on the right. Find the time that user want to schedule an event and click.

Next user are presented with the Event information page. User must assign a title to the event and then the user can assign user team members as a single participant or multiple participants. As user add team members to the calendar, user will be given a notice as

to the availability of user selection as it pertains to the schedule of each resource.

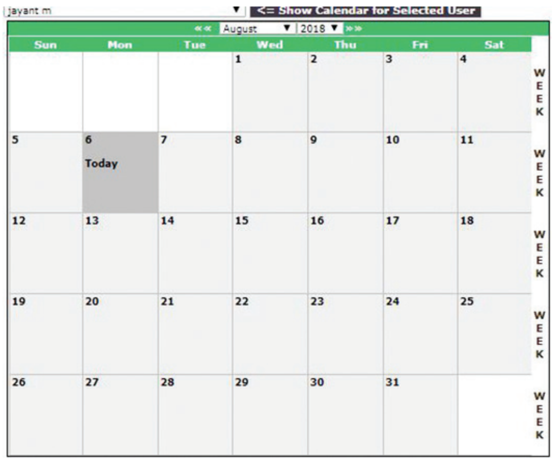


Fig. 4.13: Calendar for User

Next, pick the time that the event starts and ends. User may also designate if the event is confirmed via yes/no radio button. The e-mail alert feature, when checked, will send an email invitation to all event attendees.

If the event is scheduled with a Contact or Client, use the lookup boxes to fill in this important information. In the location box, give the details and directions, if necessary so that everyone knows exactly where to meet and how to get there. In the notes field, enter any other important information for the event.

Create an Event

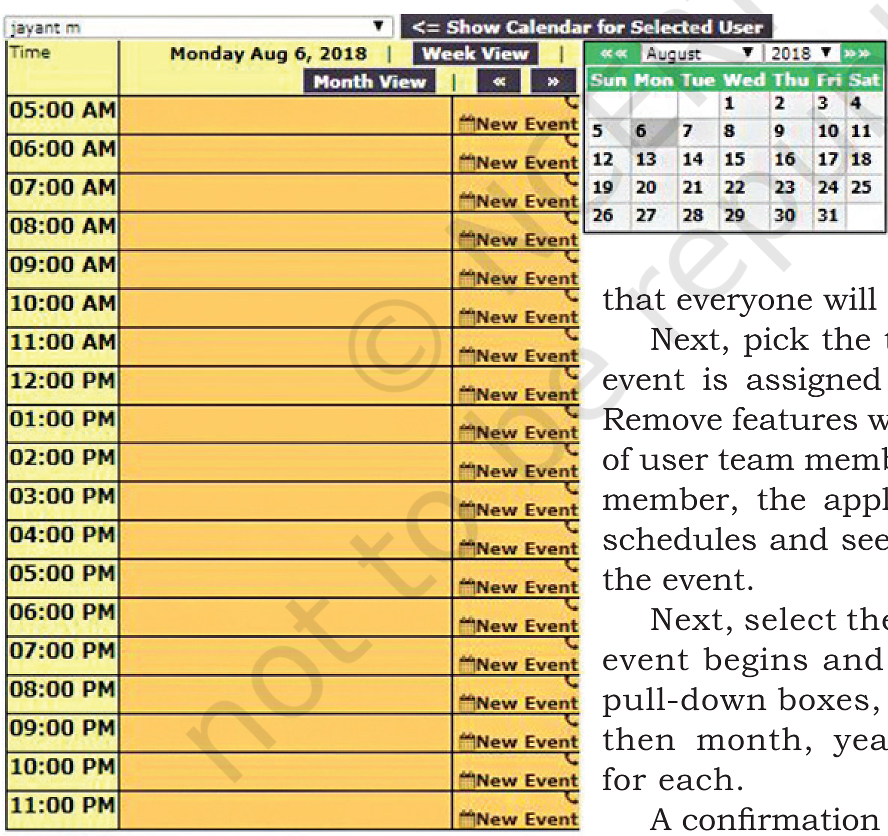


Fig. 4.14: Shows Calendar for Different Users

Create user event by first giving a title, or name to this event. This is what will show up in the Monthly and Daily views and should be a short description that everyone will recognise.

Next, pick the team members that this event is assigned to, using the Add and Remove features while selecting the names of user team members. As user add a team member, the application will check their schedules and see if they are available for the event.

Next, select the date and time that the event begins and ends using the simple pull-down boxes, first selecting the date, then month, year, hours and minutes for each.

A confirmation radio button is provided to mark the likelihood of an event and to show if it has been approved by the customer or contact.

Unit 4.indd 114 12/30/2019 3:15:43 PM

An e-mail alert can be sent out that will let the event participants know that this event has included them and may serve as an official invitation to the event itself.

If this event is focussed around a particular sales lead or customer, user can quickly use the Lookup buttons to assign this event to a Contact and Client.

Finally, include a description of the location and directions to the event and any additional information in the Notes field. Do not forget to click the Save button at the bottom of the Event information page to make user event active.

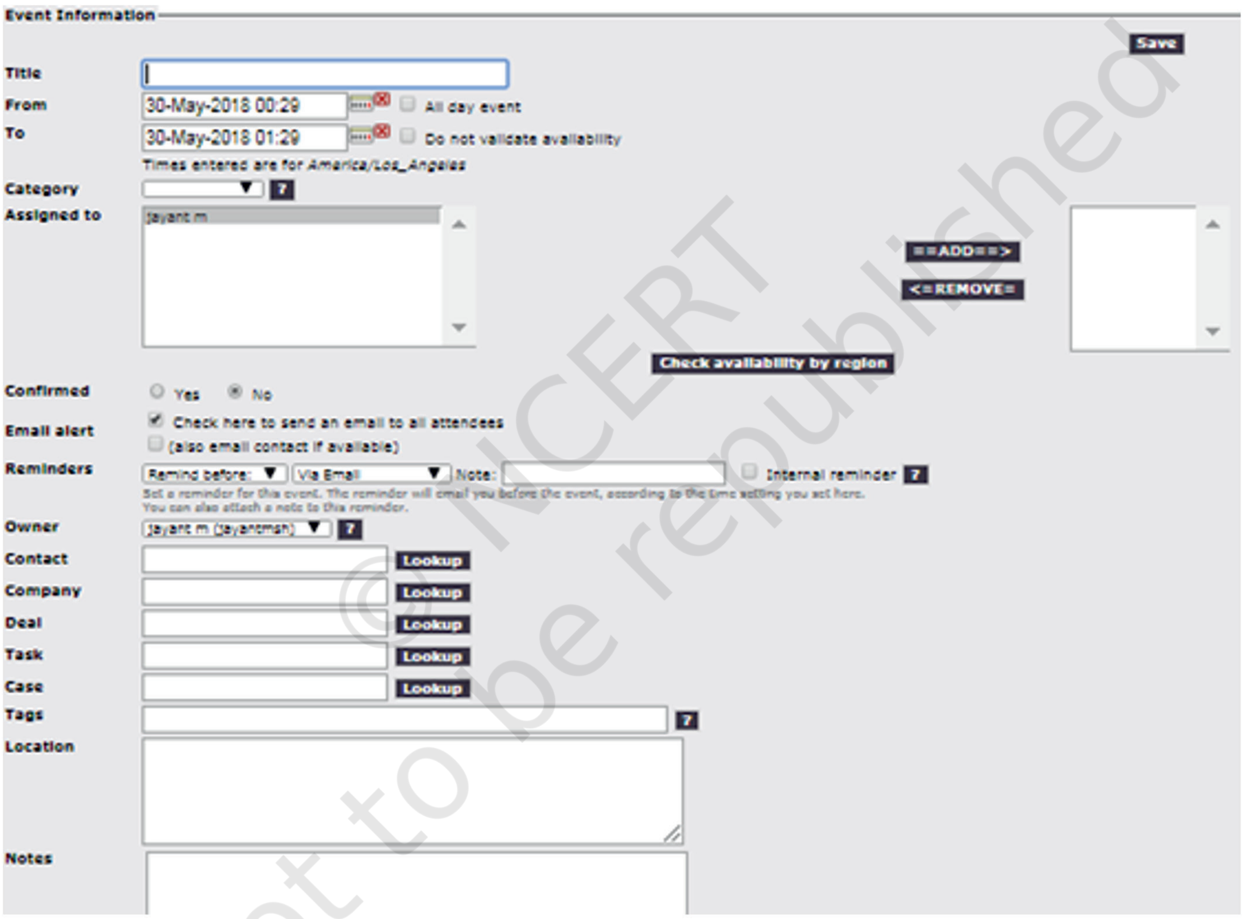


Fig. 4.15: Shows Calendar for Different Users

Company

Companies are the large business units that operate as a single organisation. Create a Company to add and associate contacts quickly. Simply click the New Company link to create the new company record.

The master entry for the company is usually the headquarters; the location of user contact will determine the region, department and other details of user specific contacts, but the company record is usually the headquarters location.

From the company's view, user can see top–down all contacts, deals, tasks, cases and other related actions and events that correspond to each entity on a corporate level. In this manner, user team can best relate success to individual markets, regions and team members. Analytics for company CRM or Sales Force Automation (SFA) behaviour are a part of the Reports section of the application.

Managers can assign contacts to team members and track success and activity through the system as deals are progressed or trouble cases closed. Users of the system see only their assigned or personal contacts and managers have the option to keep the system private or open depending upon the options set in the site administration setup.

Create/Edit a New Company

The only required field is the company name. However, there are numerous data fields including industry, annual revenue, number of employees, billing and shipping information and a detailed description form.

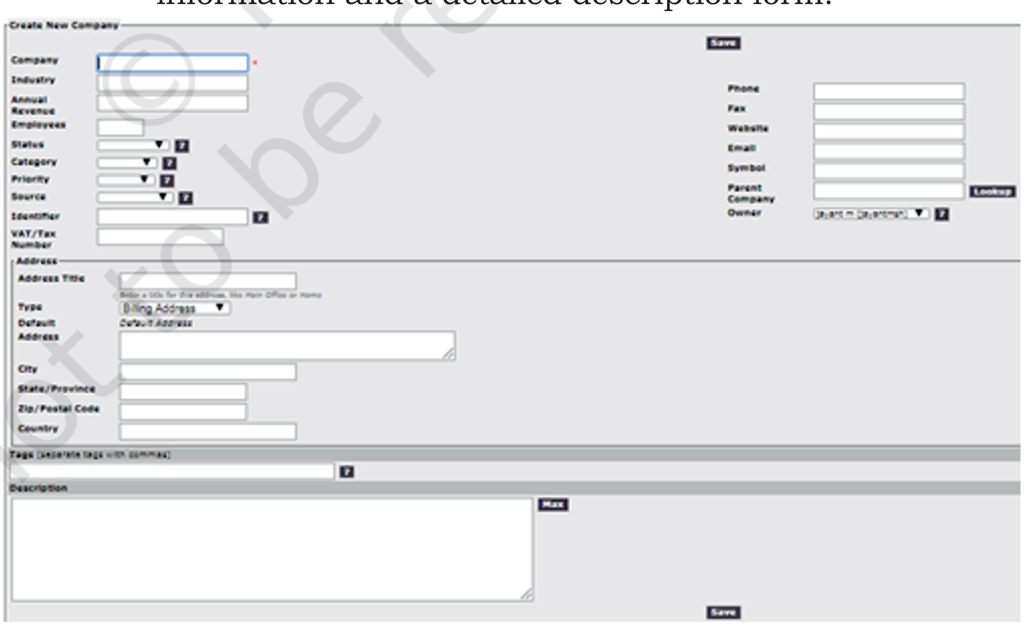


Fig. 4.16: Create/ Edit a New Company

Unit 4.indd 116 12/30/2019 3:15:44 PM

User may add custom fields through the administration setup of this application.

Set a priority to this company. Then save user work and begin adding contacts to the company, including calls and scheduling and assigning sales or support staff.

Contact

Contacts are people's individual contact information—people who user want to track, they could be sales leads, customers, vendors or whoever.

Contacts are tracked through the application via the company that they are assigned to, which user may have already created, or just contacts that user may want to track without any corporate identity if used as a customer service centre. The nature of the relationship can then be created based upon the contact and company, establishing a number of options and features for converting this contact into a valuable sale or support issue.

Contacts are individual members of a target group for sales or customer support, such as customers themselves.

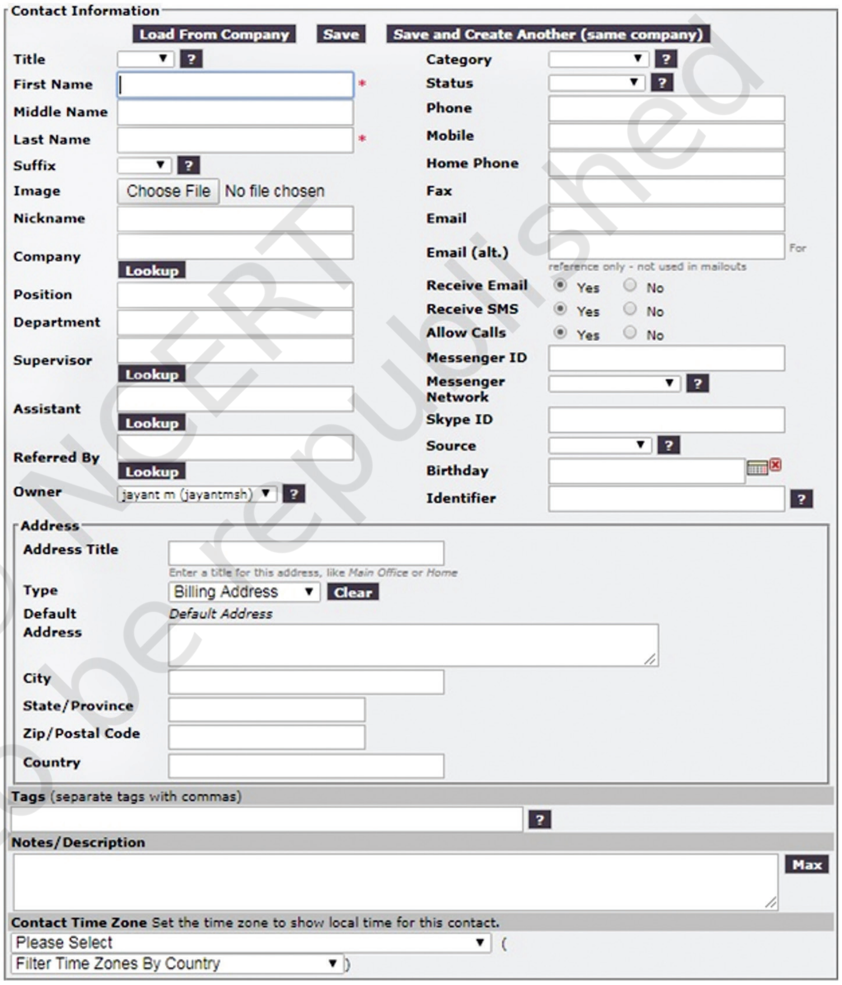


Fig. 4.17: Create/ Edit a New Contact

User may freely import contacts using any of the popular Palm, Microsoft Outlook, Act or Goldmine data; anything that will export a comma separated value (CSV) file can be used to import all of user current contacts.

Create/Edit New Contact

User can add a new contact quickly, but first try to create the Company record for this contact. Enter the contact information including e-mail address, instant messenger (IM) and network and various shipping information. User may also enter a description and assign the contact to a particular e-mail campaign.

Once created, user contacts become a vital piece of the CRM and SFA process, allowing user to track calls and e-mail interactions, product support cases, deals and just about any other type of business process.

Deal

Deal tracking ensures that user pipeline is traceable by user whole team and management; so look like user are doing something and create some prospective deals to track the relationship.

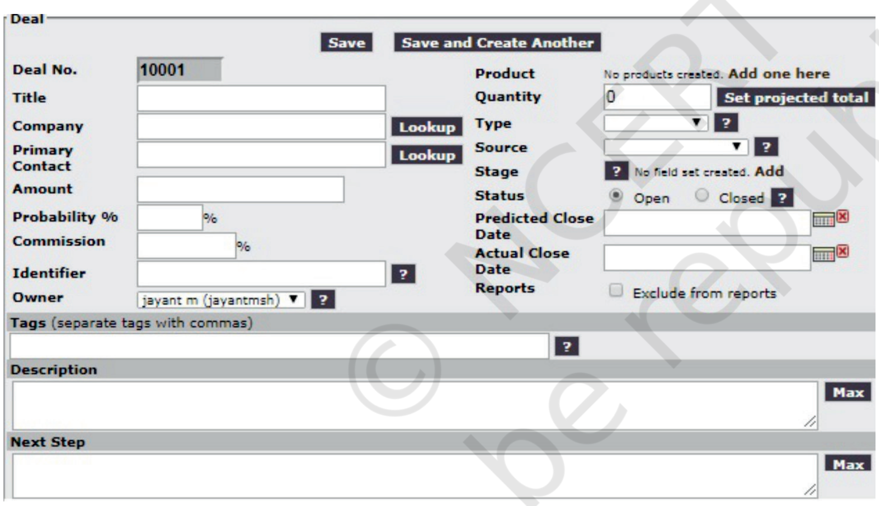


Fig. 4.18: Create/ Edit Deal

Deals are usually created when user have started to discuss pricing and/or need to send out quotations or estimates.

Converting a contact to a potential deal is the object of sales force automation, tracking the leads through the pipeline and managing the relationship, driving the potential customer to the eventual sale.

Deal tracking will assist user organisation in forecasting and user sales staff in meeting their goals. Deals can be related to sales targets, which can be set using the left-navigation link and assigning targets using the quotas feature.

Create/Edit Deal

Creating deal items are important for tracking hot leads and future sales, customised with user pre-set sales targets and goals that user define.

Deals are usually associated with companies and contacts in the system and are thus assigned. The title of the deal can be any short text description, plus there is a data field for a detailed description and follow-through plans in a next-step field. The product associated with the deal, the stage of the deal, its closed or open status, is all tracked.

Task

Tasks are short-term or long-term goals or to-dos. Click on New Task to create a new task assignment. Once created, tasks help user to track ambiguous targets and goals that may help user to close more deals or help user organisation function more efficiently.

Tasks are general goals that are usually tied to operations, functions, administration, accounting or other things that may not be directly related to a sales or support function. Use Tasks to generally track everything that user find user own creating notes for or special, pet projects that have less defined objectives. Tracking tasks, using call automation and tracking, management of user schedule and e-mail are all resources and techniques that can help user increase user customer focus and to create a high-touch customer experience. Sales are directly related to the amount of care and attention user sales staff shows to user customers and task tracking is one of the important ways to track activities and create more opportunities; click New Task to create and open a new task, enter a title, deadline, status, estimated completion, deadline and assign the task to a Company and Contact and add a description.

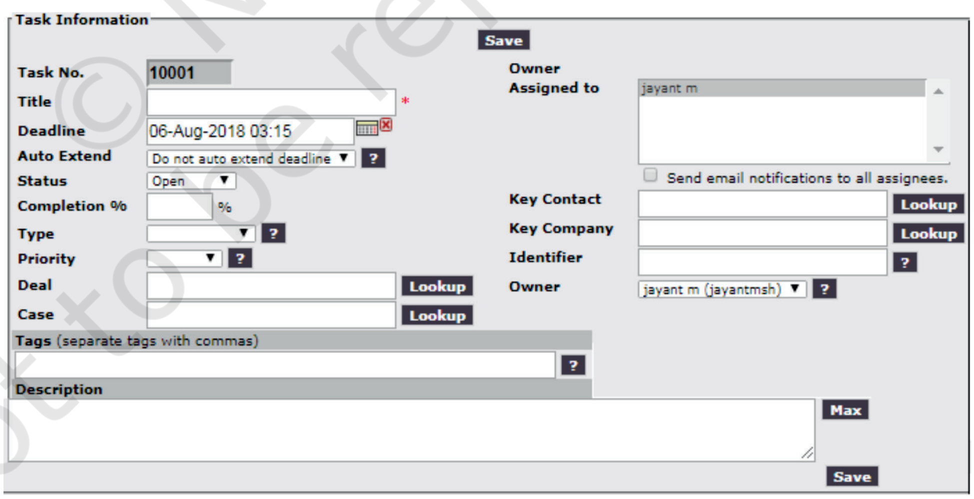


Fig. 4.19: Create a Task

NOTES

Create/Edit Task

Create a New Task by first giving a title, or name to the task. This can be specific or somewhat of a grey area.

Specific goals may be entered or a particular action, such as met quarterly goals, finishes a report, etc., but try to be specific.

Next, set a deadline for the task and try to estimate how much of it has been completed as a percentage. User can then assign the task to user itself or one of user team members and if it is related to a particular customer or prospect, link it with the Key Contact and Key Company fields.

Finally, enter a detailed description of the task that will help to explain the focus and goals of the activity. This field may be updated regularly as user edit the task, changing the completion and description as user work to meet user goals.

Case

Track customer support cases with a simple problem case tracker.

To get started, click New Case to open a new problem ticket.

Next, enter the name of this problem, the status and the date closed. User may also change the owner of this case and assign a contact or company to the problem ticket.

Next, enter a detailed description of the case and save the record.

Now that the user has created a new trouble ticket, or case, user team members can now be assigned for resolution of the customer issue. Managers can create tasks and assign resources to the problem and user can track the problem historically so that any other issues that occur can quickly be fixed using the same processes that user have established for resolution.

Click New Case to log a new customer problem or service issue. Give the case a title, assign a status, a closing date and assign to a Company or Contact, then enter a description; it is that easy.

Create/Edit Case

Track customer support cases with a simple problem case tracker.

To get started, click New Case to open a new problem ticket.

Next, enter the name of this problem, the status and the date closed. User may also change the owner of this case and assign a contact or company to the problem ticket.

Next, enter a detailed description of the case and save the record when user are finished.

Now user will have an open case record. User can use this to track calls and e-mail, provide support literature and create future meetings and events with user team members.

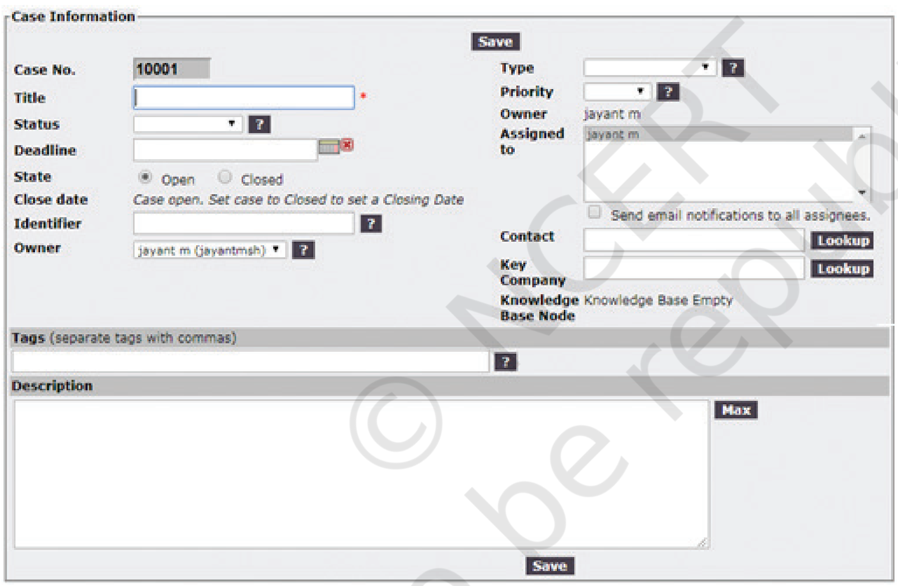


Fig.4.20: Case Information

Call

Complete call scripting, scheduling and tracking is possible from the call screens. User can create call scripts that user sales agents can read and complete during a call, important information that user can capture for reporting and analytics that will help user organisation better understand the customer.

NOTES

First, create a call script, which is a mixture of text for user sales agents to read and also interactive questions and answers that are important to user sales. Create a call script for each of user major functions and also scripts for special activities.

User can schedule calls for user itself or other team members for a particular time and date and then choose which companies and contacts that user would like to assign to the call. User can also enter additional information that may assist user sales and customer service staff.

Track important call information and follow-up using reports to find contacts that may have got stuck in the deal pipeline. By using call automation, e-mail campaigns and task tracking, user will find that realising more income and closing more sales is directly related to the amount of personal attention that is taken in keeping the customer relationship maintained.

Click New Call to start a call. User should have already created a Call Script, so assign a script to this new call. User may make the call now or schedule the call in the future; user may also schedule the call for another team member.

Create/Edit Call

Click New Call to start a call. User should have already created a Call Script, so assign a script to this new call. User may make the call now or schedule the call in future; user may also schedule the call for another team member.

If user want the call to appear on the calendar, user must check this box to schedule the call.

Choose the day of the call. If the call is in the future and user wish to schedule the call on the calendar, remember to check the box at the top of the call screen.

Calls may be assigned to team members, or user can log calls made in the past by other team members as well. Contacts and Companies can be designated in the call using the appropriate Lookup feature. If the call is with persons who are not in the system, user may log a name and phone number. If this is new information that

user would like to track, check the box below to create a new contact in the database. User may also write a note about the call.

On the right side of the Calls screen, there is a search feature for calls by keyword, call script, status (flag) and a date range. Under the call search options and on the right side of the screen is a box where active calls or upcoming calls are shown.

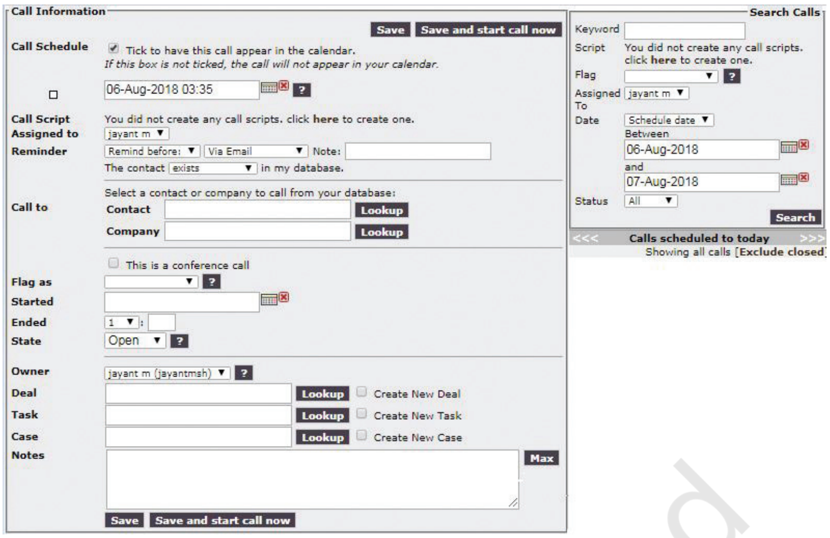


Fig.4.21: Call Information

Call List

The call list is a summary of all upcoming scheduled calls. User may quickly access user call list using this link; the names of the persons to be called, their primary phone numbers and the call button are displayed.

To begin the call, select Call from the right side of the table for the particular call that user wish to begin. User will next be presented with the Call Info page.

The Call Info page will show all the call statistics and give options to change status, schedule a follow-up call, restart the call and complete call tracking. The Call Script that is assigned to the call is also displayed so that it is easy to capture all the information required for this activity. Remember to save the call information if user edit or add information to the call script.

Call Scripts

Call scripting is important in automating user call activities. Call scripts are custom question and answer sheets that user can collect specific information on during a call and easily track all the data.

First, give the script a name and a description and then select Save to begin building the call script. User may also load (edit) and delete existing call scripts from the main call script screen.

A call script may consist of instructions or questions and responses for the persons doing the calling and being called.

A call script is composed of individual elements, which may be free-text, yes/no and multiple choice. The process for creating the call script is to enter a question and then to select the type of question on the form.

User can add entries by clicking Add. Click New to clear the form and create a new entry.

e-mail

Add a POP e-mail account or two, as many as user like; track sales leads through user very own e-mail accounts. To take advantage of this feature, user must have an account with an Internet Service Provider (ISP) that supports POP3 mail.

Use user login information for remote viewing of user POP accounts. Using this feature will also allow user to mail merge e-mail messages and forms to user contacts or service cases.

User may add an unlimited number of POP accounts and aggregate some of user recent mail using this feature. However, this is not a mail application and is not intended to function as a mail reader and sending utility. POP accounts are utilised as a function of interactivity with customer records and cannot be used to read mail, but provides quick views of user latest messages with subject and time stamps. This e-mail feature is an upgraded version after paying a fee.

Fig.4.22: POP e-mail account

e-mail Campaigns

Add a POP e-mail account or two, as many as user like; track sales leads through user very own e-mail accounts. To take advantage of this feature, user must have an account with an ISP that supports POP3 mail.

Use user login information for remote viewing of user POP accounts. Using this feature will also allow user to mail merge e-mail messages and forms to user contacts or service cases.

User may add an unlimited number of POP accounts and aggregate some of user recent mail using this feature. However, this is not a mail application and is not intended to function as a mail reader and sending utility. POP accounts are utilised as a function of interactivity with customer records and cannot be used to read mail, but provides quick views of user latest messages with subject and time stamps.

Fig.4.23: e-mail Template

When user are finished creating an e-mail template, choose Save. User should be able to see the new e-mail template appear in the right side panel as an existing template.

To begin with campaigns, choose New Campaign from the e-mail tab. Give the campaign a title and choose if this is a regular periodical mailing or just a one-time mail out. Next, select the template that user wish to be assigned to this mail and also designate which POP e-mail account will send the message.

Once finished, user will be presented with the e-mail campaign detail page, where user can see all the statistics for this campaign and the e-mail template itself. From this menu user may send the e-mail, edit the campaign or archive it for historical purposes.

Fig.4.24: e-mail campaign

Doc

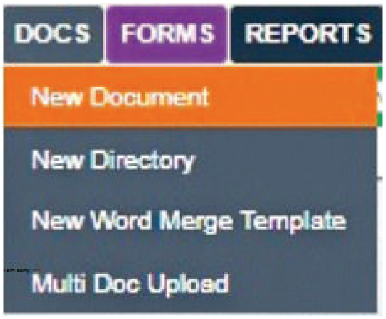


Fig. 4.25: DOCS Menu

Provide a fully functional document and file repository, where user can include any typical electronic documents, stored on a shared, virtual system for access to user whole sales and support team. Store all user important marketing material and assets, sales literature and pricing. All user company information is instantly accessible.

1. Click New Directory and give the directory, or folder, a name, a description and choose a parent folder, then click Save.
2. Click the New Folder icon.
3. Click New Document. Give the name, description, version and upload the file. User may assign it to a client or contact.

If user are browsing the directory tree, choosing Root Folder will get user to the parent directory. User may quickly click through a number of folders to view user files; if user get lost they can always click Browse at the top of the page.

Free version users have a limit of 5 megabytes of information stored of the shared document folders. Professional users have 100 megabytes of shared space for documents.

Fig. 4.26: Create New Document

Create Document

Create a New Document from within the active folder; give the document a title, its version and check if user want to overwrite existing files with the same name. User may also choose the destination folder from the pull-down box and assign this document to a particular contact or client company.

Use the File upload box and click Browse to find the file on user local computer. Once user find the file and have checked all of the fields for accuracy, click the Save button.

User document should begin to upload. If user have sent a large file, wait and make sure that user have the fastest and most reliable Internet provider and that large file uploads are allowed by user ISP (Internet Service Provider).

Create/Edit Document Folder

Creating a Document Folder is easy and simple. Just give the Folder/Directory a name, assign it to a root directory and a description of the file folder. Creating a few default folders and setting the structure of the document repository is a good first step.

Usually, folders are named after team members, allowing each person to create their own document store, with the addition on departmental folders such as Accounting, Sales and Marketing. All resources are shared, so creating the initial folder structure and uploading documents or other files helps user entire team to get started.

Uploading files is simple. Navigate to the proper folder and click New Document. Give the document or file a description, the version of the file, the folder to which it will be uploaded and attach customer or contact information. User may also choose to overwrite existing files, which will cause them to be updated. When finished, carefully check user input and click Save.

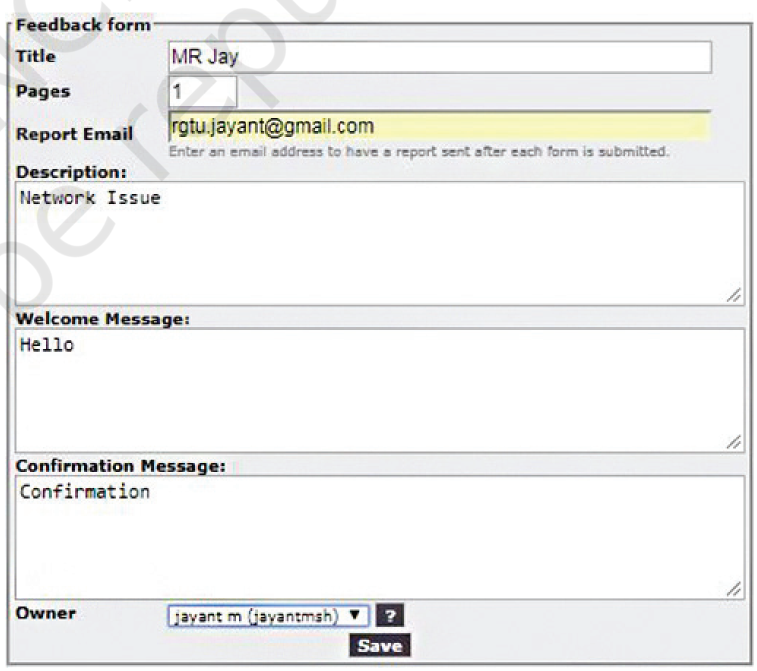


Fig. 4.27: Save Feedback Form

Form

Forms are question and answersheets that user can create to collect important information from user prospective leads and customers.

Notes

Once created, user can fill in the information or distribute the form as a link. User can create the information forms by adding one question at a time and each question can be of the following types:

- Checkbox
- Date and/or Time
- Multiple Choice
- Multiple Choice Checkboxes
- Option Boxes
- Free Text
- Yes/No

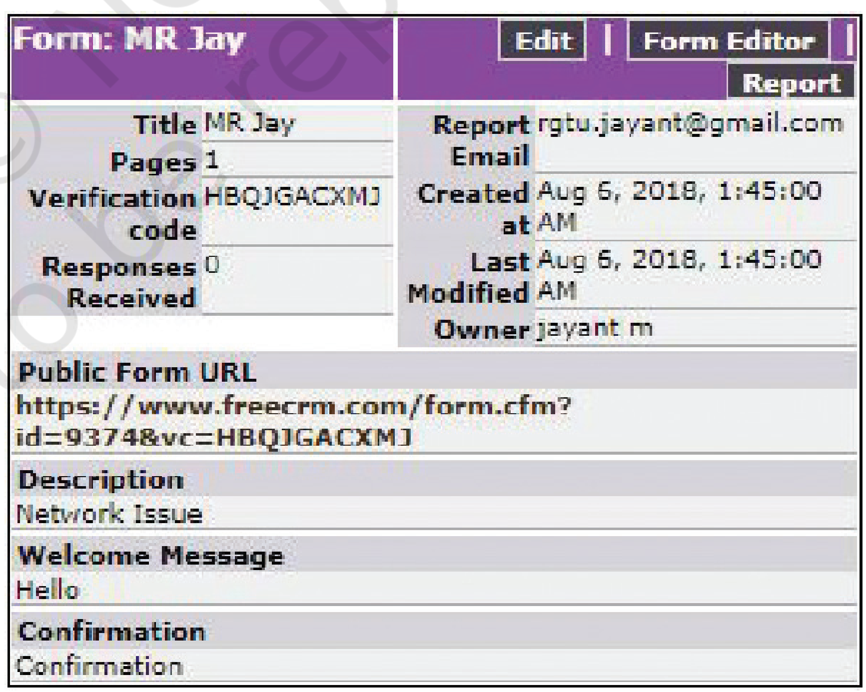
To create a form the user should follow the steps as given below.

(a) Create a new feedback form by giving user form a title, select how many pages it will have and give a short description and instructions.

(b) Select the type of question to create, such as fill in the blank, yes/no, or multiple choice.

(c) Once completed, user can then send this qualification form to user prospective leads and customers as a hyperlink or use it on calls.

After Saving



Form: MR Jay | Edit | Form Editor | Report

Title	MR Jay	**Report Email**	rgtu.jayant@gmail.com
Pages	1	**Created at**	Aug 6, 2018, 1:45:00 AM
Verification code	HBQJGACXMJ	**Last Modified**	Aug 6, 2018, 1:45:00 AM
Responses Received	0	**Owner**	jayant m

Public Form URL
https://www.freecrm.com/form.cfm?id=9374&vc=HBQJGACXMJ

Description
Network Issue

Welcome Message
Hello

Confirmation
Confirmation

Fig. 4.28: After Save Feedback Form

Report

There are seven reporting functions for this application. Reports are used to create specific views of user company's statistics and activity in a variety of areas. Custom reports can be created and saved, allowing user fine control and giving managers a top–down view of the activities of user sales staff.

Reports

Call Reports	
Call Statistics	Show call statistics
Most called contacts	Show the most contact contacts
Call by Month	Show calls by month of the year
Call by Week	Show calls by week day
Calls by Team	Show calls scheduled and completed by the team
Deal Calls	Show calls relating to deals
Task Calls	Show calls relating to tasks
Case Calls	Show calls relating to cases
Call Flags	Show call flag statistics
Call Flags by User	Show call flags by user
Calls by Time	Calls report based on the day of month, day of week and time of day.
Call by Day	Show calls breakdown by day

Support Reports	
Case Statistics	Show case statistics
All Open Cases	Show the 20 longest outstanding open cases
Closed Cases	Shows closed cases statistics
Open Cases	Shows open cases statistics
Open and Closed Cases	Show how long cases have been open or closed by each user
Cases Closed by Users	Shows cases closed by users assigned to them
Cases by Users	Show how many cases are assigned to your users
Cases Open by Users	Shows all open users's cases
Cases and Companies	Shows cases with company assignments

Company Reports	
Company Statistics	Shows company statistics
Company Countries	Show companies by country of origin
Company Deals	Show deals by company
Company Counts by Users	Show how many companies each user created
Company Categories	Show how many companies there are in each category
Company States	Show company counts by state
Company Access	Show the 30 most accessed companies
New Companies	Show the 30 newest companies added
Company By Status	Shows company by status report

Contact Reports	
Contact Statistics	Show contact statistics
Contact Countries	Show contacts by countries
Contact States	Show contact counts by state
Contact Access	Show the 30 most accessed contacts
Contact by Status	Show contacts by status report
New Contacts	Show the 30 newest contacts
Contact by Category	Show contacts by category report

Email Campaign Reports	
Email Statistics	Show email statistics
Mailouts Report	Show email campaign mailout report by status of mails
Campaign Subscriptions	Show how many contacts are subscribed and unsubscribed to your email campaigns

Generic Reports	
Duplicate Records	Find duplicate records
Tag Statistics	Show statistics regarding tag usage
Recent Notes	Show all recent notes entered

Deal Reports	
Deal Statistics	Show deal statistics
Deal Products	Show products associated with deals
Deals Predicted Closing	Show predicted closing dates for deals
Deals Created by Month	Show deals by creation time
Deal Pipeline by Stage	Show deals by stage
Deals Closed by Month	Show deals by actual closing time
Deal Pipeline by Type	Show deals by type
Deals Closed Late	Show deals that closed late
Deal Pipeline by Probability	Show deals by probability
Deal Pipeline by State	Show deals by state (Open or Closed)
Deal Contacts	Show which contacts are more prominent in your deals
Deals by Products	Show deals by their assigned products
Deals by team	Show deals by team members
Deals by companies	Show open deals by companies
Deals by source	Show deals by source
Deals Commission Report (Closed)	Show deals commission breakdowns for closed deals
Deals Commission Report (Open)	Show deals commission breakdowns for open deals

Task Reports	
Task Statistics	Show task statistics
Tasks Closed by Users	Show tasks closed by users
Open Tasks	Show tasks still open
Tasks Created by Users	Show tasks created by users
Task Deadlines	Show tasks deadlines by months
Complete Task Report	Show all task reports
Tasks by assigned users	Show tasks with assigned users

Usage and User Reports	
Usage by sections	Show the most used sections of the application
Usage Statistics	System usage statistics
Usage by week day	Show user usage by day of the week
Usage by month	Show user usage by month
Users's time online	Show how long users spend online

Fig. 4.29: Report

Setup

The Setup menu allows users and administrators to control and customise the behaviour of the CRM application.

User may import user contacts and companies with the first option. The second option, Update Organization, allows user to edit user company information.

Update Profile allows user to set a default currency, a time zone and welcome text for user team. Administrators may select all of the important functions and details for the site.

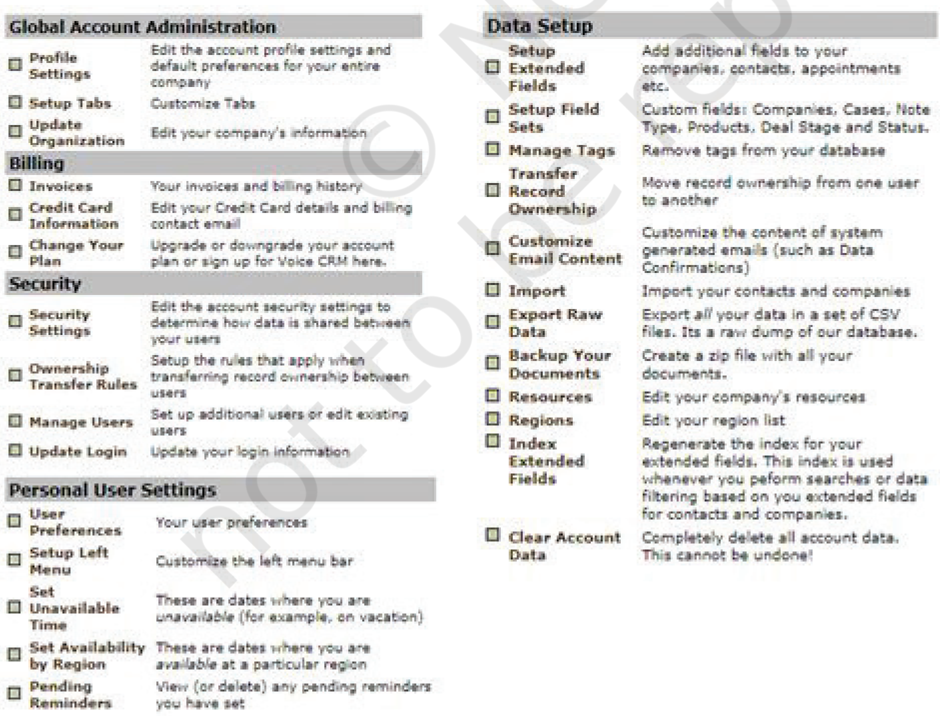
Resources are links to sites or other data and are virtual bookmarks that are shared with user team. Creating quick links to support documentation, or competitor websites is helpful to user sales and customer support staff.

Regions are assignments for user team members and allow user to model the system that fits user structure.

Setting unavailable times and dates are important for users' time management and system resource allocation. By marking out user available time, the system will let others know that user will not be an available resource for the team or customers.

Administrators can set the availability for particular regions, which is helpful in synchronising corporate communications in a distributed, multi-time zone environment.

For update profile of user, Edit the account profile and preferences for user company.



Global Account Administration	
Profile Settings	Edit the account profile settings and default preferences for your entire company
Setup Tabs	Customize Tabs
Update Organization	Edit your company's information
Billing	
Invoices	Your invoices and billing history
Credit Card Information	Edit your Credit Card details and billing contact email
Change Your Plan	Upgrade or downgrade your account plan or sign up for Voice CRM here.
Security	
Security Settings	Edit the account security settings to determine how data is shared between your users
Ownership Transfer Rules	Setup the rules that apply when transferring record ownership between users
Manage Users	Set up additional users or edit existing users
Update Login	Update your login information

Personal User Settings	
User Preferences	Your user preferences
Setup Left Menu	Customize the left menu bar
Set Unavailable Time	These are dates where you are *unavailable* (for example, on vacation)
Set Availability by Region	These are dates where you are *available* at a particular region
Pending Reminders	View (or delete) any pending reminders you have set

Data Setup	
Setup Extended Fields	Add additional fields to your companies, contacts, appointments etc.
Setup Field Sets	Custom fields: Companies, Cases, Note Type, Products, Deal Stage and Status.
Manage Tags	Remove tags from your database
Transfer Record Ownership	Move record ownership from one user to another
Customize Email Content	Customize the content of system generated emails (such as Data Confirmations)
Import	Import your contacts and companies
Export Raw Data	Export *all* your data in a set of CSV files. Its a raw dump of our database.
Backup Your Documents	Create a zip file with all your documents.
Resources	Edit your company's resources
Regions	Edit your region list
Index Extended Fields	Regenerate the index for your extended fields. This index is used whenever you peform searches or data filtering based on you extended fields for contacts and companies.
Clear Account Data	Completely delete all account data. This cannot be undone!

Fig. 4.30: Setup Option

Import

Import user contacts and companies; Update Organisation — Edit user company's information; Resources — Edit user company's resources; Regions — Edit user region list; Set Unavailable Time — these are dates where user are unavailable at all (for example, on vacation); Set Availability by Region — these are dates where user are available in a particular region.

Update Login — Update user login information; Create/Edit users — Setup more users to log in to the CRM, or edit existing ones; Setup Extended Fields — Add additional fields to user companies, contacts, appointments, etc.

Setup Field Sets — customise selection fields, such as Products, Deal Stage or Case Status.

Profile Setup

Update Profile allows user to set a default currency, a time zone and welcome text for user team. Administrators may then select if users can share information, if it is private, or if only managers can see private information. User can also select the default design look and feel using the skins selection box, a clock mode and the amount of history shown for

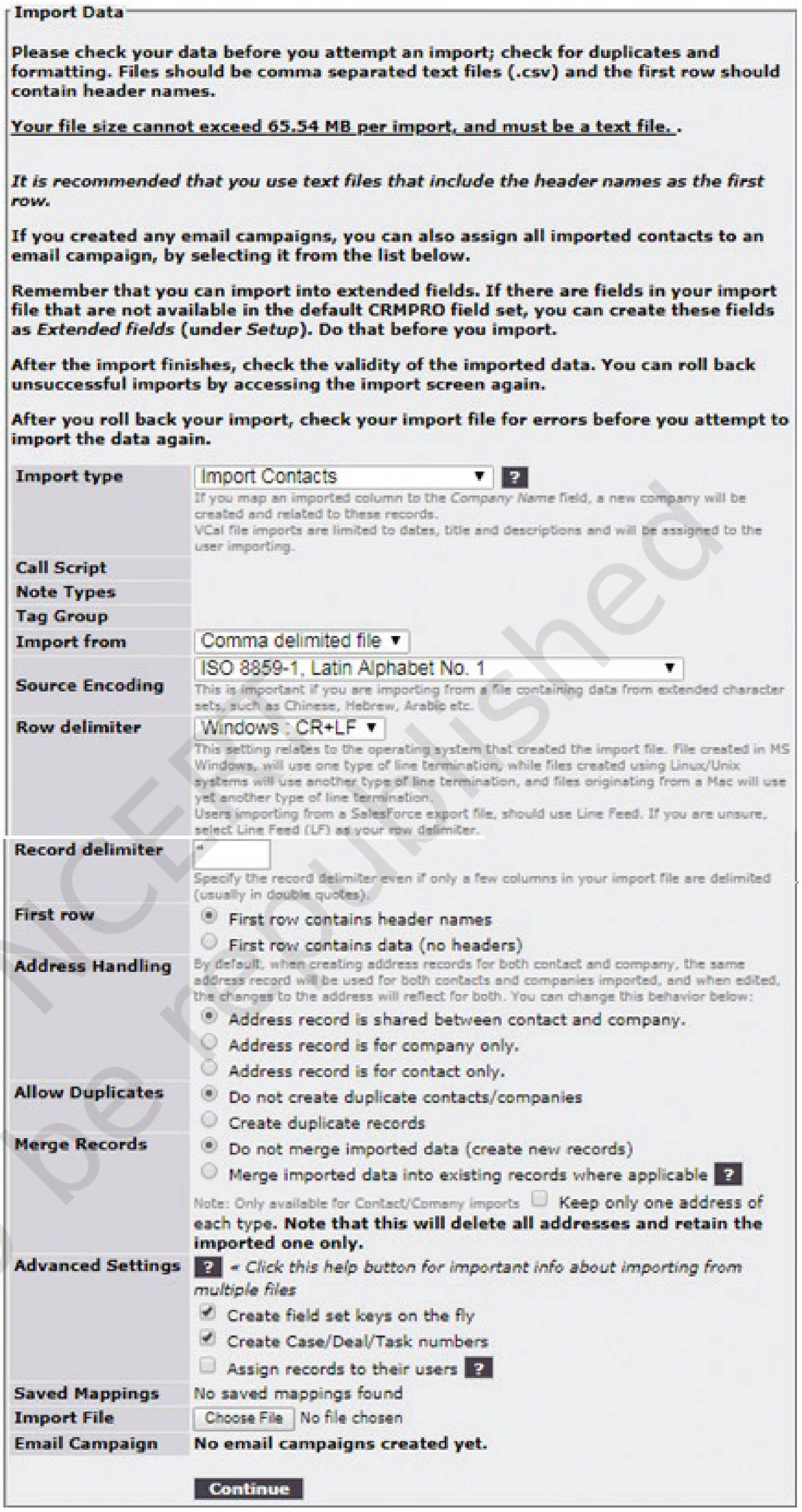


Fig. 4.31: Import Option

NOTES

user activity tracking. User may then designate start and end times for user work days and if user want to check schedules against a user's availability.

Check Your Progress

A. Multiple choice questions

1. User receives an e-mail message from a potential customer. You need to track the potential customer as a new lead in Microsoft Dynamics CRM 2011. What should you do?
   (a) Convert the e-mail message into a lead.
   (b) Create a new lead and set a connection to the e-mail message.
   (c) Create a new lead, attach the e-mail message to the lead and then save the lead.
   (d) Create a new lead from the regarding lookup of the e-mail message.

2. Which parameter is the only parameter that the Execute method takes?
   (a) Non-entity-specific request
   (b) Request class
   (c) Target property
   (d) Response class

3. What are some popular CRM software?
   (a) SAP CRM
   (b) Salesforce
   (c) Oracle CRM on Demand
   (d) All of the above

4. Which of the following is a set of prices that are charged for the product under certain circumstances?
   (a) Discount List
   (b) Price List
   (c) Products
   (d) Quote

B. Short answer questions

1. How well do users understand customers?
2. What is CRM?
3. What modules can be included in CRM?
4. What technologies should be used to develop CRM?
5. What are the benefits of CRM?
6. How does CRM help sales?
7. How do I know if my company needs a CRM?
8. How does CRM work with customer mails?
9. How can we import data to my CRM?